

STATE OF SOUTH CAROLINA

COUNTY OF GREENVILLE

IN THE MATTER OF:

(Decedent)

IN THE PROBATE COURT

INVENTORY AND APPRAISEMENT: PROBATE PROPERTY

☐ ORIGINAL

☐ AMENDED # \_\_\_\_\_

(must restate the unchanged information from the original Inventory)

CASE NUMBER: \_\_\_\_\_

**File the original Inventory and Appraisement with the Probate Court within ninety (90) days following the fiduciary appointment.**

A copy shall be sent to each interested person who has demanded it. A Proof of Delivery must be filed with the Court. The gross fair market value of all probate assets, regardless of location (whether in this state or elsewhere), should be listed as of the date of death. Continue on additional sheets if necessary. A Supplementary, Amended, or Corrected Inventory should be utilized for correcting, adjusting or adding to an original inventory, and *must restate the unchanged information from the original Inventory*. A qualified and disinterested appraiser may be employed to ascertain the value of any asset. If an appraiser is employed, his/her name and address must be indicated with the item or items he/she appraised.

RECAPITULATION

Probate

Schedule A - Real Estate .....	\$ _____
Schedule B - Stocks and Bonds .....	\$ _____
Schedule C - Notes Due Decedent and Cash .....	\$ _____
Schedule D - Insurance on Decedent's Life - Payable to the Estate .....	\$ _____
Schedule E - Jointly Owned Property .....	NA
Schedule F - Other Miscellaneous Assets .....	\$ _____
Schedule G - Transfers During Decedent's Life Payable to the Estate .....	\$ _____
Schedule H - Powers of Appointment Payable to the Estate .....	\$ _____
Schedule I - Annuities and Retirement Accounts Payable to the Estate .....	\$ _____

GROSS VALUE OF PROBATE ESTATE..... \$ \_\_\_\_\_

The undersigned, being sworn, states: That the following schedules contain a complete and accurate inventory and appraisement of all probate real and personal property of this estate so far as the undersigned is informed; that he/she has estimated and/or appraised all listed property at its fair market value, according to the best of his/her knowledge and ability.

Personal Representative

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone (Work): \_\_\_\_\_

(Home): \_\_\_\_\_

(Cell): \_\_\_\_\_

Email: \_\_\_\_\_

SWORN to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Notary Public for South Carolina

My Commission Expires: \_\_\_\_\_

Attorney: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

	% owned by Decedent	(If none, so state) Fair Market Value of Decedent's Interest
A. <b>REAL ESTATE</b> in Decedent's name alone or as tenants in common (not as joint with right of survivorship). Describe each property by listing its full street/city/state address, tax map number, deed book and page and description consistently (house, lot, buildings, acreage). List any oil/mineral rights and time shares, if it is real property. If the property is encumbered, list the full fair market value of the property here and show the encumbrance in Encumbrance section at bottom.		
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
<i>Check here if any of the above properties are being rented and list rental income in Schedule C</i>		
B. <b>STOCKS, BONDS</b> in Decedent's name alone or tenants in common (not as joint with right of survivorship). List each name of security(ies) and number of shares.		
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
C. <b>CASH, BANK ACCOUNTS, NOTES RECEIVABLES</b> in Decedent's name alone or as tenants in common. List each separate account type and institution and the last two digits of each account. List all bank accounts owned by Decedent alone or as tenants in common (checking, savings, CDs, money market, brokerage, employment bonus, cash award, final paycheck etc.), cash on hand, notes payable to Decedent, and survival action proceeds.		
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
D. <b>LIFE INSURANCE</b> payable to the Decedent's estate.		
1. _____	_____	_____
2. _____	_____	_____
E. <b>JOINTLY OWNED PROPERTY – REPORTING IS NOT REQUIRED</b>		<b>N/A</b>
F. <b>ALL OTHER MISCELLANEOUS PERSONAL PROPERTY</b> in Decedent's name alone or as tenants in common. List below any tangible personal property, including household goods & furnishings, vehicles, boats/motors/trailers, mobile homes that are not de-titled (include year/make/model/VIN, if applicable), airplanes, equipment, interest in a partnership or unincorporated business, articles or collections having either artistic or intrinsic value, including coins, guns, artwork, jewelry, etc., and any other miscellaneous probate items not listed elsewhere, including any digital assets.		
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
G. <b>TRANSFERS DURING DECEDENT'S LIFE PAYABLE TO ESTATE ONLY</b> Any transfers intended to take effect at death <u>if payable to the Estate</u> shall be reported. A trust created by Decedent in which income for life was retained by the Decedent, power to revoke or other incidents of ownership retained by the Decedent, lifetime transfers of real property in which Decedent retained life estate, etc.		
1. _____	_____	_____
2. _____	_____	_____
H. <b>POWERS OF APPOINTMENT PAYABLE TO THE ESTATE ONLY</b> List property, both real and personal, over which Decedent possessed a Power of Appointment whether testamentary or otherwise, if such property is payable to the Estate.		
1. _____	_____	_____
I. <b>ANNUITIES AND IRA, ETC. PAYABLE TO THE ESTATE ONLY</b> List any annuities or retirement accounts owned by the Decedent that are payable to the Estate.		
1. _____	_____	_____
2. _____	_____	_____
<b>TOTAL PROBATE ESTATE VALUE:</b>		\$ _____
		=====
<b>ENCUMBRANCES</b> (e.g., mortgages, liens, judgments, etc., <b>but not general debts of the estate</b> ). List debts of the Decedent secured by assets on the above schedule and describe the debt and the specific asset encumbered.		
1. _____		_____
2. _____		_____
<b>TOTAL ENCUMBRANCES:</b>		\$ _____
		=====